



# Oakland County Department of Information Technology Project Scope and Approach

**Project Name: Economic Development Salesforce Enhancements (2021-22) Project ID: D12191SF**

- Replace the Salesforce to Outlook Connector
- Review, test, and activate Salesforce functionality releases
- Replace current data backup utility with a more robust & efficient solution
- Create a full sandbox environment to test data loads and for users to test new functionality
- Research, develop and implement Salesforce Campaigns and applicable integrations

## **Approach**

- Review current business process and conduct needs assessment with customer, ensuring current manual processes are refined and automated.
- Document system requirements
- Determine and document system architecture and diagram
- Assess User Hardware and Software Requirements
- Conduct Tech Review
- Order software if needed
- Develop Implementation Plan
- Develop new functionality
- Develop User Acceptance Test Plan
- Test new functionality
- Acquire User Acceptance Sign off
- Conduct Change Control
- Develop User Documentation, Service Center Knowledge Documents
- Train users on new system
- Release new functionality into production

## **Research & Analysis**

### **Gartner Research Recommendation**

Gartner's *Vendor Rating: Salesforce* document (updated July 2021) contained multiple recommendations related to Salesforce. First, it emphasized that as Salesforce continues to expand its offerings with both internal development and additional acquisitions, it is critical "to invest in dedicated Salesforce skill sets and resources to derive maximum value from its products." (p. 6). A portion of the hours on this project will be spent by IT staff investing time to understand the latest product advancements and upcoming product retirements to ensure the Econ Dev staff is getting the most use out of their licensing.

In addition, the County will be exploring multiple integrations with our Salesforce environment. Gartner cautions that historically, there have been "inconsistent capabilities among third-party

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Salesforce service providers, and a lack of deep industry-specific process skills. This leads to troubled implementations and loss of agility in terms of deployment speed” (p. 9). While Gartner also mentions that the updated Partner Program could help with this issue, knowing there are potential concerns, the County needs to thoroughly vet any potential integrations from previously unknown vendors.

## **Benefits**

*See Return on Investment (ROI) Analysis Document*

## **Impact**

<b>Number of Users</b>	30
<b>Divisions</b>	All of Economic Development
<b>Leadership Groups</b>	Finance/Admin

## **Risk**

<b>Business Environment</b>	Medium - Project will require some changes to existing business processes.
<b>Technical Environment</b>	Medium - Previously implemented technologies with new aspects and/or new requirements.

## **Assumptions**

**Staffing** IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

<b><u>Role:</u></b>	<b><u>Name</u></b>	<b><u>Hours per Day</u></b>
Project Sponsor:	Laura Dodd	As needed

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**Facilities**

- 
- 

**Technical**

- 
- 

**Funding**

- Information Technology

**Other**

- If any 3rd party tools require a purchase, Economic Development will provide funding.

**Priority**

**Constraints**

- 
- 

**Exclusions**

- 
-

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## PROJECT PHASE AUTHORIZATION

<b>Phase(s):</b> All	
<b>Total Estimated Application Services</b>	<b>Hours:</b> 720
<b>Total Estimated Technical Systems</b>	<b>Hours:</b> 30
<b>Total Estimated CLEMIS</b>	<b>Hours:</b>
<b>Total Estimated Internal Services</b>	<b>Hours:</b>
<b>IT Application Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT Technical Systems Division Manager Approval:</b>	<b>Date:</b>
<b>IT CLEMIS Division Manager Approval:</b>	<b>Date:</b>
<b>IT Internal Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT Management Approval:</b>	
Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Date:</b>
Reason:	
<b>Project Sponsor Approval:</b>	
Title:	<b>Date:</b>

## PROJECT SUMMARY

<b>Authorized Development (see above)</b>	<b>Hours:</b> 750	
<b>Previously Authorized Development</b>	<b>Hours:</b>	
<b>Preliminary Estimated Development for Future Phases</b>	<b>Hours:</b>	
<b>Grand Total Estimated Development</b>	<b>Hours: 750</b>	<b>Cost: \$122,225</b>

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## PROJECT COMPLETION AUTHORIZATION

<b>Customer Acceptance of Product:</b>	
Title:	Date:
<b>Project Office Review:</b>	Date:

Economic Development Salesforce Enhancements (2021-22) - Size Estimate (+/- 10% to 50%)

1	Type	ID	Task Name	Estimated
2				Hours
3		000000	ED Salesforce Enhancements 2021-22	750
4				750

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
<b>Benefits/Savings:</b>							
Tangible Benefits Subtotal:	1,316	1,316	1,316	1,316	1,316	1,316	7,896
Cost Avoidance Subtotal:	40,306	40,705	41,109	41,520	41,937	42,360	247,936
<b>Costs:</b>							
Development Services Subtotal:	122,225	25,121	25,498	25,881	26,269	26,663	251,656
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	1,549	1,549	1,549	1,549	1,549	1,549	9,291
Infrastructure Subtotal:	0	0	0	0	0	0	0
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
<b>Annual Statistics:</b>							
Annual Total Savings	41,622	42,021	42,425	42,836	43,253	43,676	255,832
Annual Total Costs	123,774	26,670	27,047	27,429	27,817	28,211	260,947
Annual Return on Investment	(82,152)	15,351	15,379	15,407	15,435	15,464	(5,116)
Annual Costs/Savings Ratio	297.38%	63.47%	63.75%	64.03%	64.31%	64.59%	
<b>Project Cumulative Statistics:</b>							
Cumulative Total Savings	41,622	83,643	126,068	168,903	212,156	255,832	255,832
Cumulative Total Costs	123,774	150,443	177,490	204,919	232,736	260,947	260,947
Cumulative Return on Investment	(82,152)	(66,801)	(51,422)	(36,015)	(20,580)	(5,116)	(5,116)
Cumulative Cost/Savings Ratio	297.38%	179.86%	140.79%	121.32%	109.70%	102.00%	102.00%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
<b>Signatures:</b>							
Benefits Reviewed By Project Sponsor	_____			Date:	_____		
Costs (including IT Resources) Reviewed By Information Technology Project Manager	_____			Date:	_____		

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Quickly view customer engagement activities and utilize best practices for marketing communications.	Intangible Benefit					0	
Replace Spanning Backup Environment with a more robust & efficient solution would save the cost of Spanning licensing.	Tangible Benefit	IT/APP SERV CONTRACTED SERV (63600-1080201-152010-730373)	ANN	1	1,316	1,316	
Replacing the Spanning Backup Environment would prevent the County from purchasing an additional full sandbox for the QA Environment.	Cost Avoidance	IT/APP SERV CONTRACTED SERV (63600-1080201-152010-730373)	ANN	1	13,734	13,734	
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks)	Cost Avoidance	Economic Development	ANN	104	73	7,592	1.015
Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so that ED staff will have an understanding of client needs.	Intangible Benefit					0	
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.	Intangible Benefit					0	





**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Quickly view customer engagement activities and utilize best practices for marketing communications.	Intangible Benefit												
Replace Spanning Backup Environment with a more robust & efficient solution would save the cost of Spanning licensing.	Tangible Benefit	x	x	x	x	x	x	1,316.00	1,316.00	1,316.00	1,316.00	1,316.00	1,316
Replacing the Spanning Backup Environment would prevent the County from purchasing an additional full sandbox for the QA Environment.	Cost Avoidance	x	x	x	x	x	x	13,734.00	13,734.00	13,734.00	13,734.00	13,734.00	13,734
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks)	Cost Avoidance	x	x	x	x	x	x	7,592.00	7,705.88	7,821.47	7,938.79	8,057.87	8,179
Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so that ED staff will have an understanding of client needs.	Intangible Benefit												
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.	Intangible Benefit												

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Replace the soon to be retired Salesforce to Outlook Connector with another technology that is compatible with Salesforce and our existing Office 365 environment which will create a more efficient user experience.	Intangible Benefit												
Increased Reporting Metrics	Intangible Benefit												
Expand user documentation for increased efficiency and training experiences. (Avg 5 hours weekly x 52 weeks)	Cost Avoidance	x	x	x	x	x	x	18,980.00	19,264.70	19,553.67	19,846.98	20,144.68	20,447

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Savings Summary

<b>Benefit/Savings Description</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>	<b>Total</b>
<b>Tangible Benefit:</b>							
Replace Spanning Backup Environment with a more robust & efficient solution would save the cost of Spanning licensing.	1,316	1,316	1,316	1,316	1,316	1,316	7,896
<i>Tangible Benefits Subtotal:</i>	<b>1,316</b>	<b>1,316</b>	<b>1,316</b>	<b>1,316</b>	<b>1,316</b>	<b>1,316</b>	<b>7,896</b>
<b>Cost Avoidance:</b>							
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks)	7,592	7,706	7,821	7,939	8,058	8,179	47,295
Expand user documentation for increased efficiency and training experiences. (Avg 5 hours weekly x 52 weeks)	18,980	19,265	19,554	19,847	20,145	20,447	118,237
Replacing the Spanning Backup Environment would prevent the County from purchasing an additional full sandbox for the QA Environment.	13,734	13,734	13,734	13,734	13,734	13,734	82,404
<i>Cost Avoidance Subtotal:</i>	<b>40,306</b>	<b>40,705</b>	<b>41,109</b>	<b>41,520</b>	<b>41,937</b>	<b>42,360</b>	<b>247,936</b>
<b>Intangible Benefit:</b>							

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Savings Summary

<b>Benefit/Savings Description</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>	<b>Total</b>
Quickly view customer engagement activities and utilize best practices for marketing communications.							
Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so that ED staff will have an understanding of client needs.							
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.							
Replace the soon to be retired Salesforce to Outlook Connector with another technology that is compatible with Salesforce and our existing Office 365 environment which will create a more efficient user experience.							
Increased Reporting Metrics							
<b>Savings Total:</b>	<b>41,622</b>	<b>42,021</b>	<b>42,425</b>	<b>42,836</b>	<b>43,253</b>	<b>43,676</b>	<b>255,832</b>

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?						
								Y1	Y2	Y3	Y4	Y5	Y6	
IT Hours - New Development	Development Svcs		HR	750	163	122,225		x						
IT Hours - System Maintenance	Development Svcs				165	0								
IT Hours - Customer Support	Development Svcs		HR	100	165	16,500	1.015		x	x	x	x	x	
IT Hours - Planned Maintenance	Development Svcs		HR	50	165	8,250	1.015		x	x	x	x	x	
User Hours - New Development	Development Svcs					0								
User Hours - PTNE/OT	Development Svcs					0								
Contractor Professional Services	Development Svcs					0								
PC System - Acquisition	Hardware				687	0								
PC System - Maintenance	Hardware				2,936	0								
Notebook - Acquisition	Hardware				1,115	0								
Notebook - Maintenance	Hardware				3,024	0								
Tablet Notebook - Acquisition	Hardware				1,421	0								
Tablet Notebook - Maintenance	Hardware				2,800	0								
Laserprinter - Acquisition	Hardware				1,432	0								
Laserprinter - Maintenance	Hardware				1,408	0								
PC Maintenance User Owned	Hardware				2,720	0								
Printer Maintenance User Owned	Hardware				1,264	0								
File Space (100GB)	Hardware		ANN		23	0								
Package Software - Acquisition (OwnBackup)	Software		EA	25	62	1,549		x						
Package Software - Maintenance (OwnBackup)	Software		EA	25	62	1,549			x	x	x	x	x	
Business Objects Access	Software					0								
Term Emulation SFTW-Acquisition	Software					0								
Term Emulation SFTW-Maintenance	Software					0								
Server - Acquisition/Upgrade	Infrastructure				8,000	0								
Server - Maintenance	Infrastructure				360	0								
Server Sftwre - Acquisition/Upgrade	Infrastructure				335	0								
Server Sftwre - Maintenance	Infrastructure					0								
Server Rack Mount	Infrastructure				400	0								

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs	122,225.00					
IT Hours - System Maintenance	Development Svcs						
IT Hours - Customer Support	Development Svcs		16,747.50	16,998.71	17,253.69	17,512.50	17,775.19
IT Hours - Planned Maintenance	Development Svcs		8,373.75	8,499.36	8,626.85	8,756.25	8,887.59
User Hours - New Development	Development Svcs						
User Hours - PTNE/OT	Development Svcs						
Contractor Professional Services	Development Svcs						
PC System - Acquisition	Hardware						
PC System - Maintenance	Hardware						
Notebook - Acquisition	Hardware						
Notebook - Maintenance	Hardware						
Tablet Notebook - Acquisition	Hardware						
Tablet Notebook - Maintenance	Hardware						
Laserprinter - Acquisition	Hardware						
Laserprinter - Maintenance	Hardware						
PC Maintenance User Owned	Hardware						
Printer Maintenance User Owned	Hardware						
File Space (100GB)	Hardware						
Package Software - Acquisition (OwnBackup)	Software	1,548.50					
Package Software - Maintenance (OwnBackup)	Software		1,548.50	1,548.50	1,548.50	1,548.50	1,548.50
Business Objects Access	Software						
Term Emulation SFTW-Acquisition	Software						
Term Emulation SFTW-Maintenance	Software						
Server - Acquisition/Upgrade	Infrastructure						
Server - Maintenance	Infrastructure						
Server Sftwre - Acquisition/Upgrade	Infrastructure						
Server Sftwre - Maintenance	Infrastructure						
Server Rack Mount	Infrastructure						

**Oakland County -- Economic Development Salesforce Enhancements (2021-22)**  
Return on Investment Analysis

Cost Summary

<b>Cost Description</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>	<b>Total</b>
<b>Development Services:</b>							
IT Hours - New Development	122,225						122,225
IT Hours - System Maintenance							
IT Hours - Customer Support		16,748	16,999	17,254	17,512	17,775	86,288
IT Hours - Planned Maintenance		8,374	8,499	8,627	8,756	8,888	43,144
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
<i>Development Services Subtotal:</i>	<b>122,225</b>	<b>25,121</b>	<b>25,498</b>	<b>25,881</b>	<b>26,269</b>	<b>26,663</b>	<b>251,656</b>
<b>Hardware:</b>							
<i>Hardware Subtotal:</i>							
<b>Software:</b>							
Package Software - Acquisition (OwnBackup)	1,549						1,549
Package Software - Maintenance (OwnBackup)		1,549	1,549	1,549	1,549	1,549	7,743
<i>Software Subtotal:</i>	<b>1,549</b>	<b>1,549</b>	<b>1,549</b>	<b>1,549</b>	<b>1,549</b>	<b>1,549</b>	<b>9,291</b>
<b>Infrastructure:</b>							
<i>Infrastructure Subtotal</i>							
<b>Training:</b>							
<i>Training Subtotal:</i>							
<b>Other:</b>							
<i>Other Subtotal:</i>							
<b>Costs Total:</b>	<b>123,774</b>	<b>26,670</b>	<b>27,047</b>	<b>27,429</b>	<b>27,817</b>	<b>28,211</b>	<b>260,947</b>



